Open Bee™

Version 3 – August 2014

# Open Bee R.M.A – Administrator Guide

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# Contents

**Contents** ..... **3**

**Welcome** ..... **4**

**Solution description** ..... **5**

**Installing Open Bee™ RMA** ..... **6**

*System requirements* ..... *6*

*Step by step installation using web browser* ..... *6*

**Configuration wizard of Open Bee™ RMA application** ..... **13**

**General settings:** ..... **15**

*Connection settings to Open Bee DMS:* ..... *16*

*Date format:* ..... *16*

*Administrator password:* ..... *17*

**Filing documents with Open Bee RMA** ..... **18**

**Retrieving documents filed with Open Bee RMA** ..... **21**

*Log in to Open Bee Portal as a registered user* ..... *21*

*Locate your documents* ..... *22*

*Searching your documents* ..... *23*

**Device compatibility list** ..... **24**

# Welcome

The Open Bee™ RMA Guide gathers recommendations, advice and suggestions on how to use the Open Bee Ricoh MFP Agent in combination with Open Bee™ Portal. In order to make the best out of it, please acquaint yourself with the concepts and procedures described hereunder.

When installing and setting up an Open Bee system, you must be familiar with the Ricoh scanning devices that you will use with Open Bee software components, and the basic installation and configuration workflow.

This guide is intended for administrators responsible for the initial installation, configuration, and licensing of Open Bee DMS Solutions.

Please visit our Open Bee™ website should you have any question or should you need any additional information:

http://www.myopenbee.com

This guide have been written and published under the control of Open Bee™.

# Solution description

Open Bee™ RMA (Ricoh MFP Agent) is a software solution which allows you to index and file scanned paper documents, directly from your Ricoh MFP touch's screen to your Open Bee Portal DMS Server.

To file scanned paper documents to Open Bee Portal DMS server, you simply need to follow the next steps:

1. Walk up to your Ricoh MFP device
2. Select Open Bee app from the touch screen
3. Select a "filing category" corresponding to your document type *
4. Enter few metadata when prompted
5. Modify scanning resolution and color (optional)
6. Click on "File" to route the document to Open Bee Portal

** Open Bee™ RMA displays existing filing wizards which have been set in Open Bee Portal "filing categories". Please read the appropriate section of the Open Bee Portal user manual.*

# Installing Open Bee™ RMA

## System requirements

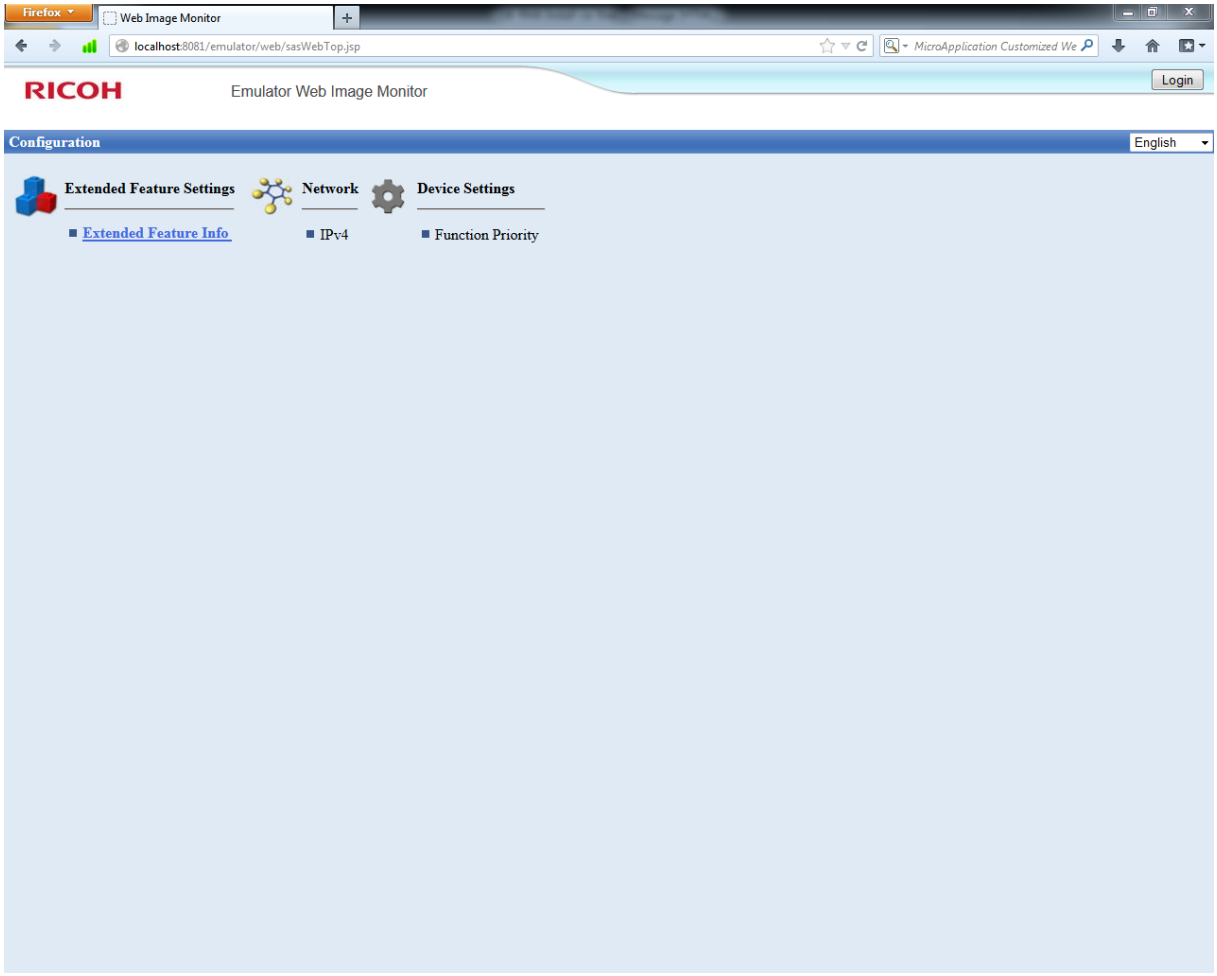
- Ricoh MFP compatible with SDK Type-J version 10 and 11 (only WVGA and uWVGA)
- LAN network and/or internet connexion
- Open Bee Portal DMS Server v5.6 or superior

## Step by step installation using web browser

Please, open a Web browser and type the following URL:: http://IP-adress:port-number/

- IP-address: IP address of your Ricoh MFP
- Port-number: the port number is not required, just enter http://IP-adress/, ( Should you use a simulator, enter http://IP-adress:8081/

Validate.The following page will be displayed:



To successfully install Open Bee RMA, you need an administrator account.

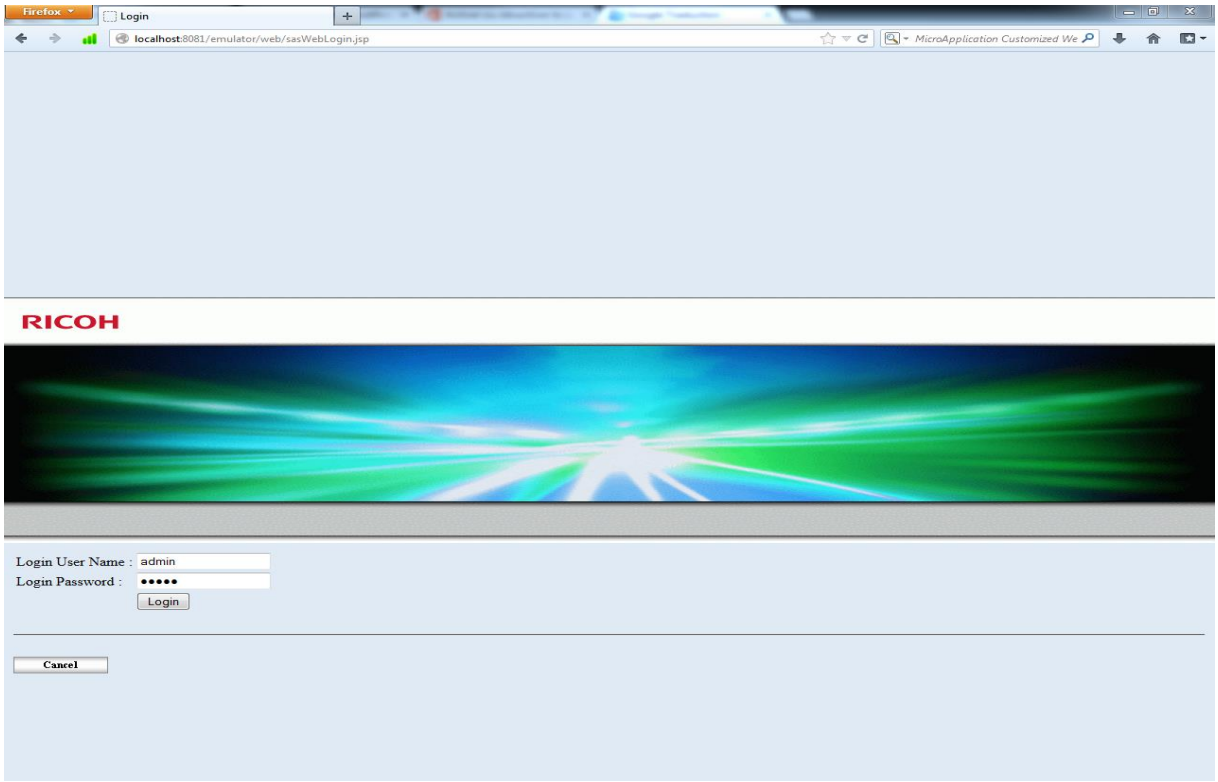
The default administrator account is:

- Login: admin
- Password: by default no password is required  but if you use a simulator, you must set : ricoh

To get the authentication form, you must click on the “login” button, in the top right of the over page.

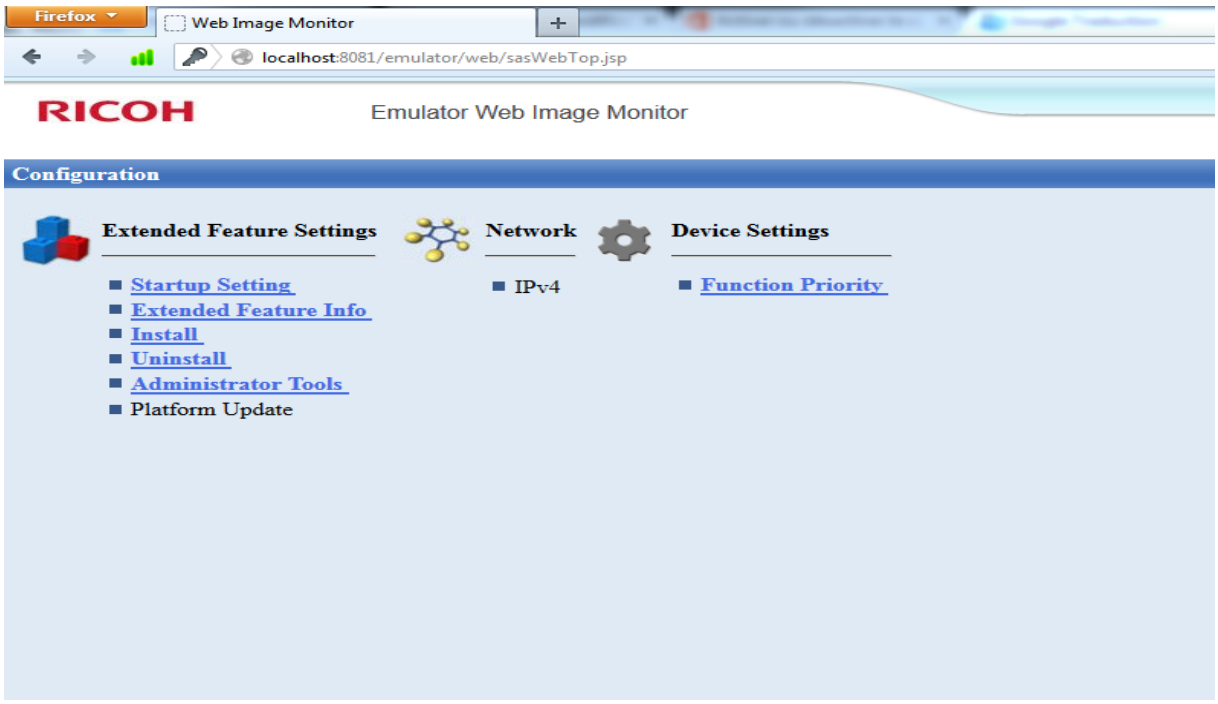
To access the authentication form , please click on the 'login' link in the top right corner of the page

The following page will be displayed:



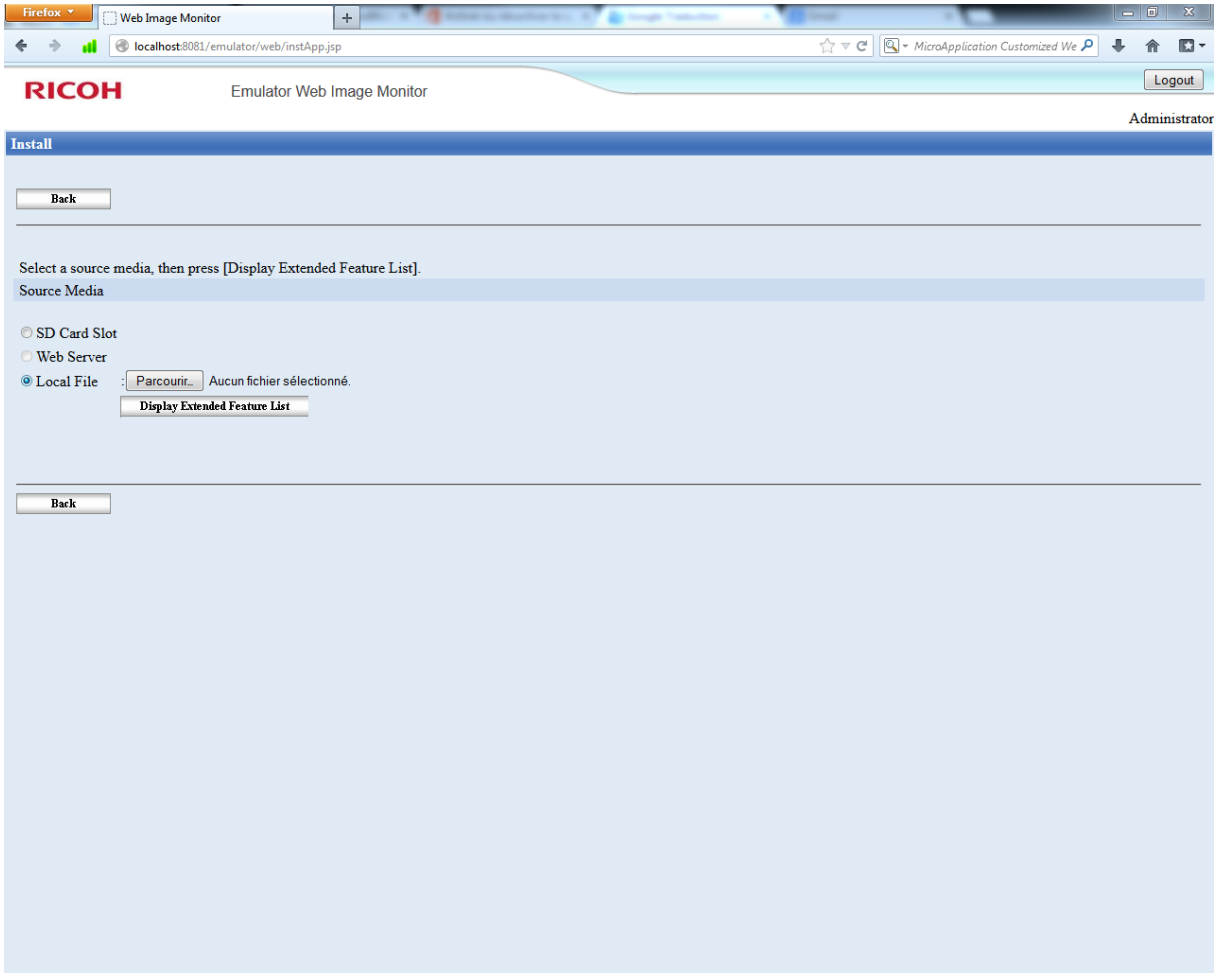

Enter the login and password and confirm by clicking on the “login” button.

Once authenticated, the following page will be displayed:

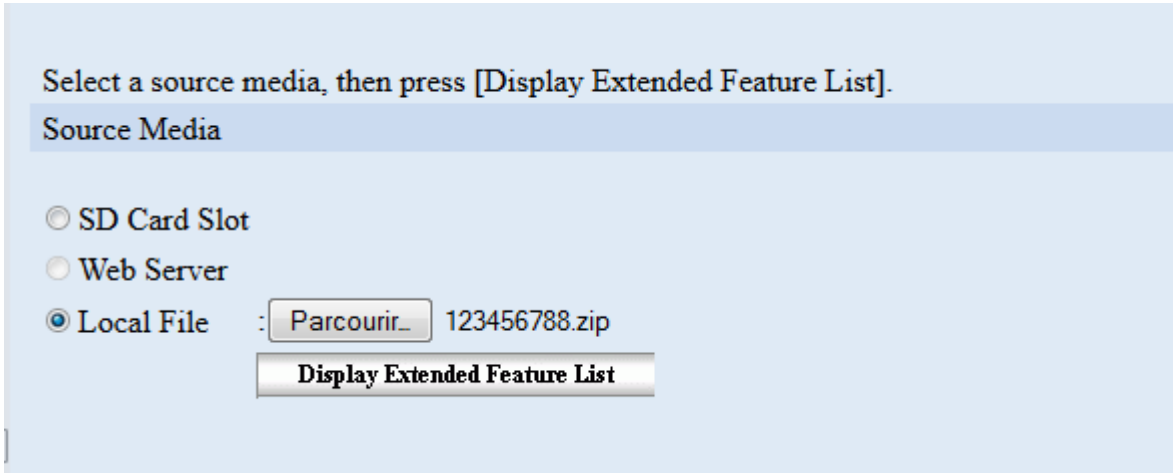



In order to complete the installation of Open Bee RMA, click on the " install" link.

The following page will be displayed:



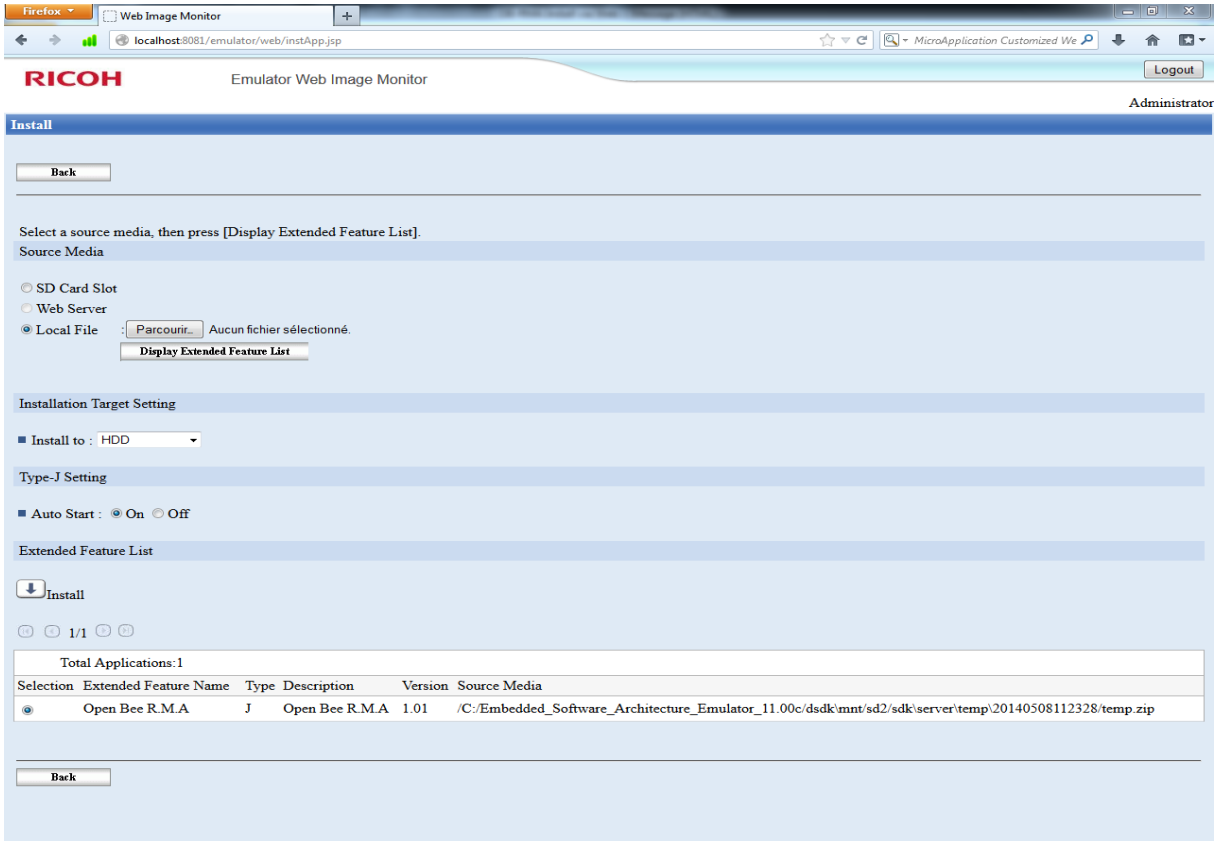

Click the browse button and select the zip file containing the Open Bee RMA application. The name of the selected file will be displayed next to the “browse” button.



Click on the “Display Extended Feature List” button.

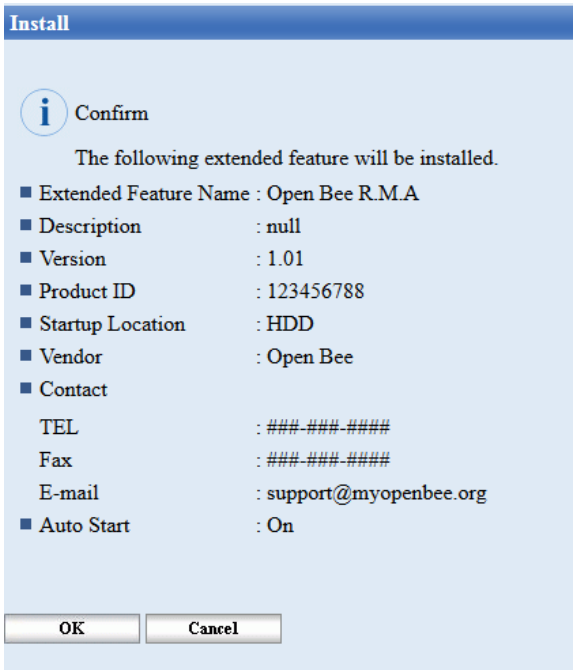
Select the parameters as shown below.

The installation must be made on the MFP’s HDD.

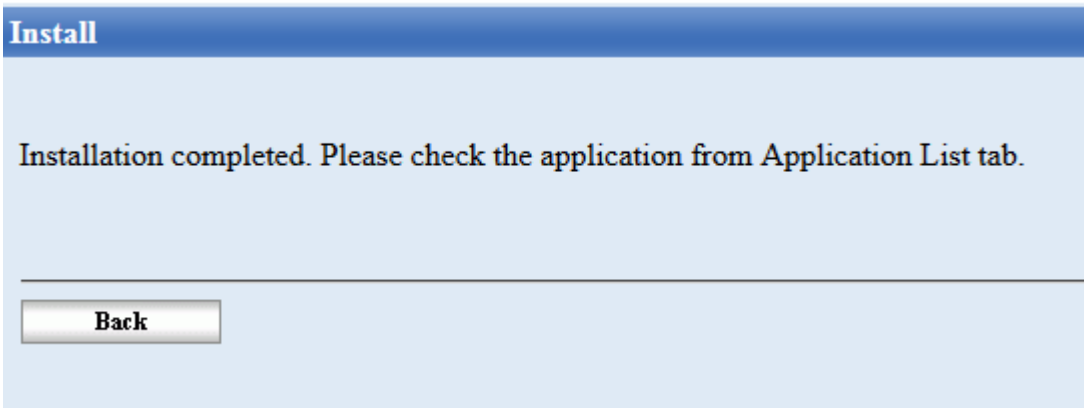



To start the installation, click the “down arrow” button next to the word “Install”.

Confirm your choice by clicking OK.

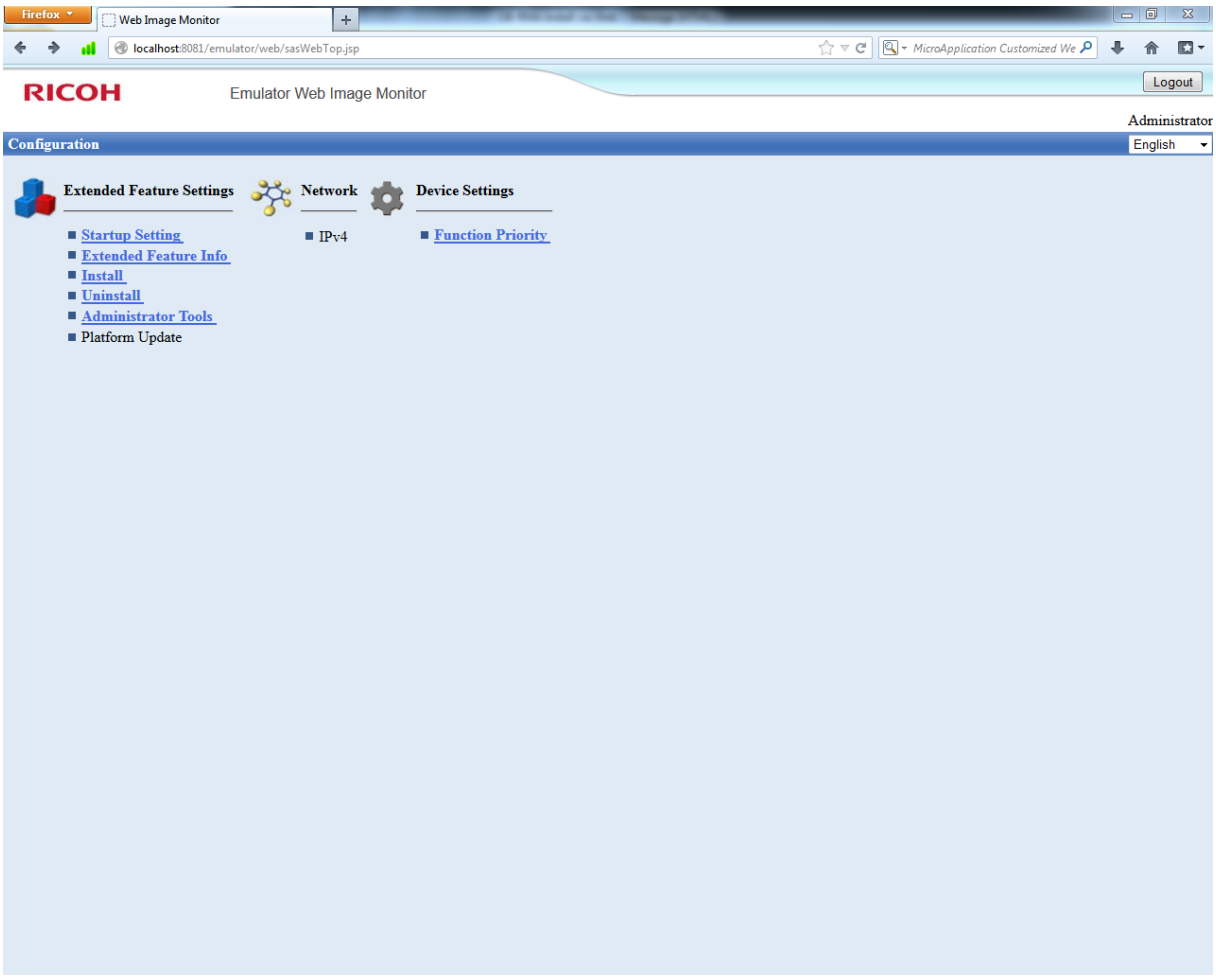


After a few seconds, a confirmation message will acknowledge the successful state of the installation:

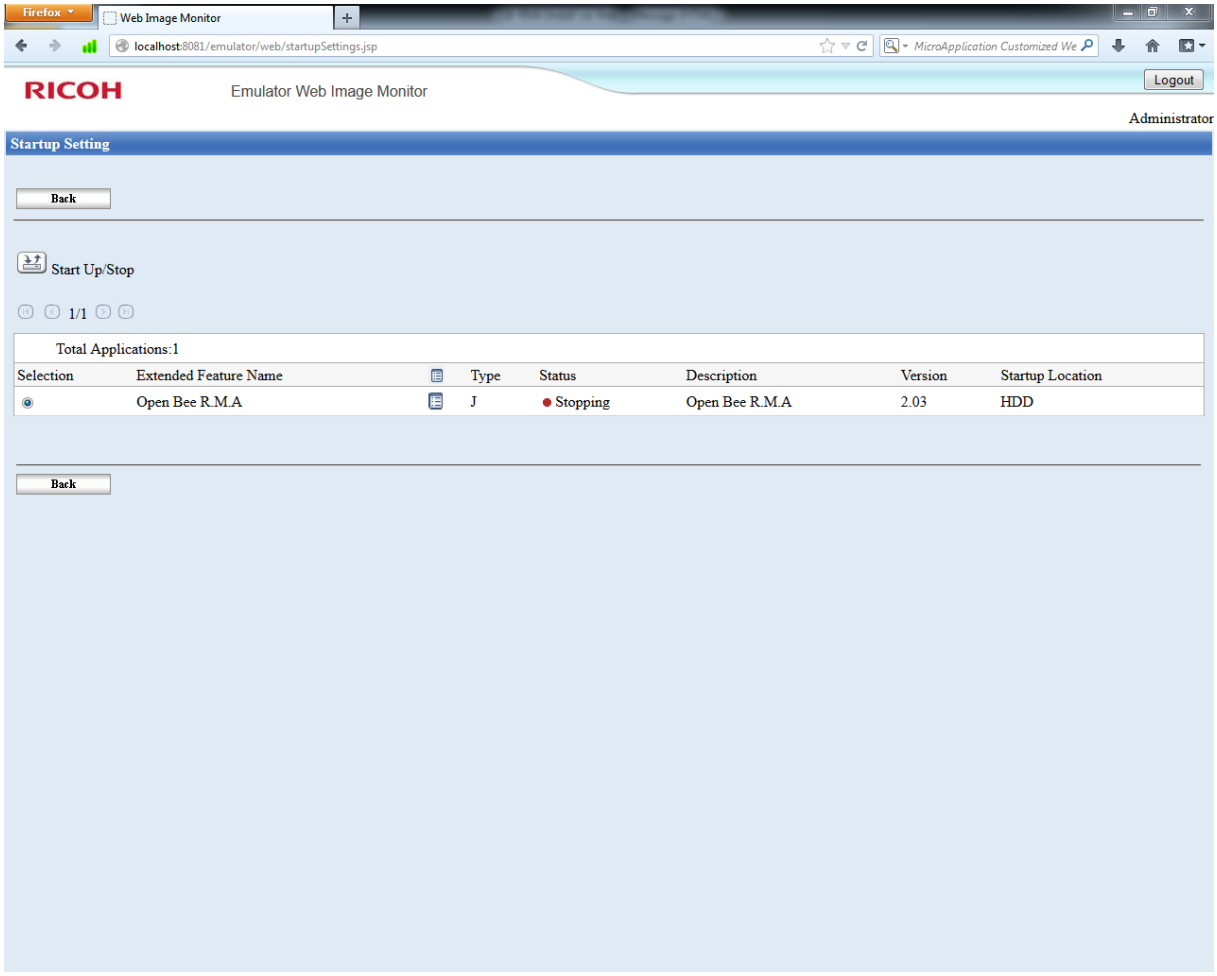



Go back twice to return to the administration page.

To start Open Bee RMA, click on the link “startup setting” to get the list of all applications:



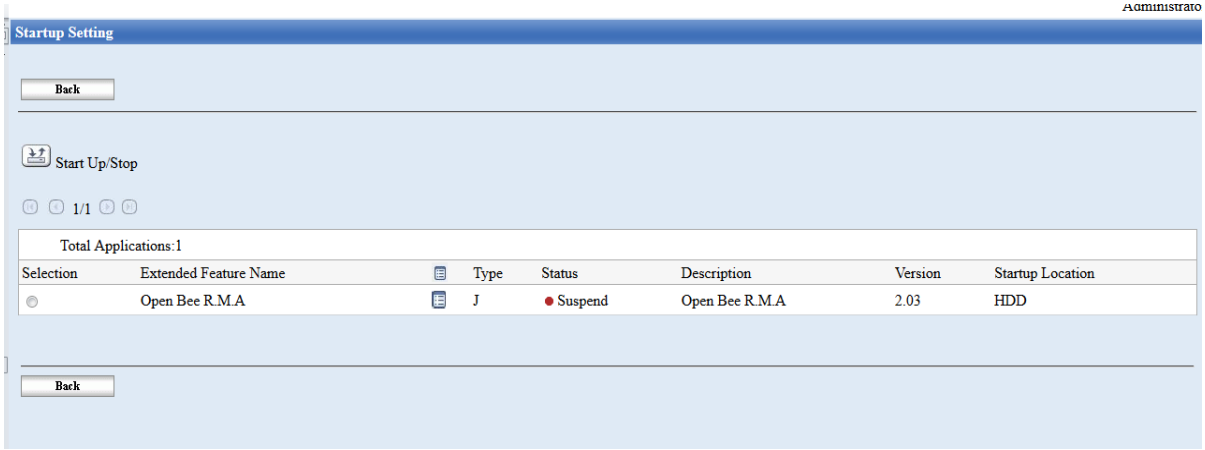
The following page will be displayed:




Select Open Bee RMA

Then click on the " two arrows" button  next to the words "start up/stop"

The status of the Open Bee R.M.A application will change from Stopping to Suspend.




The installation of Open Bee RMA is now completed. You can now go to the configuration wizard

# Configuration wizard of Open Bee™ RMA application

On the MFP, click on

to access to the application.

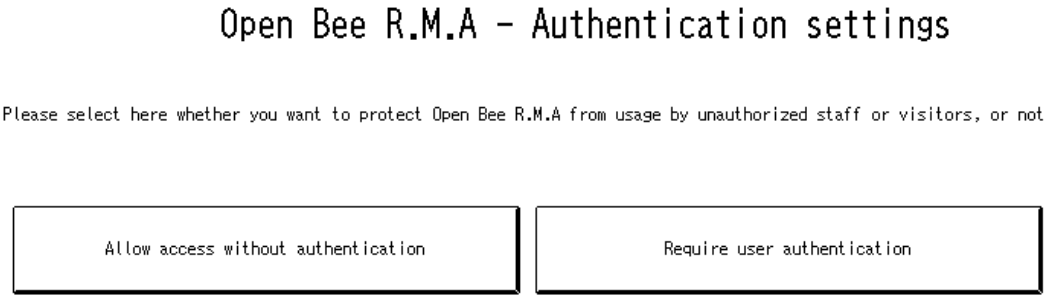
Then Press the “Open Bee R.M.A” button :

When the application is running on the MFP for the first time, you must complete two steps to perform the configuration.

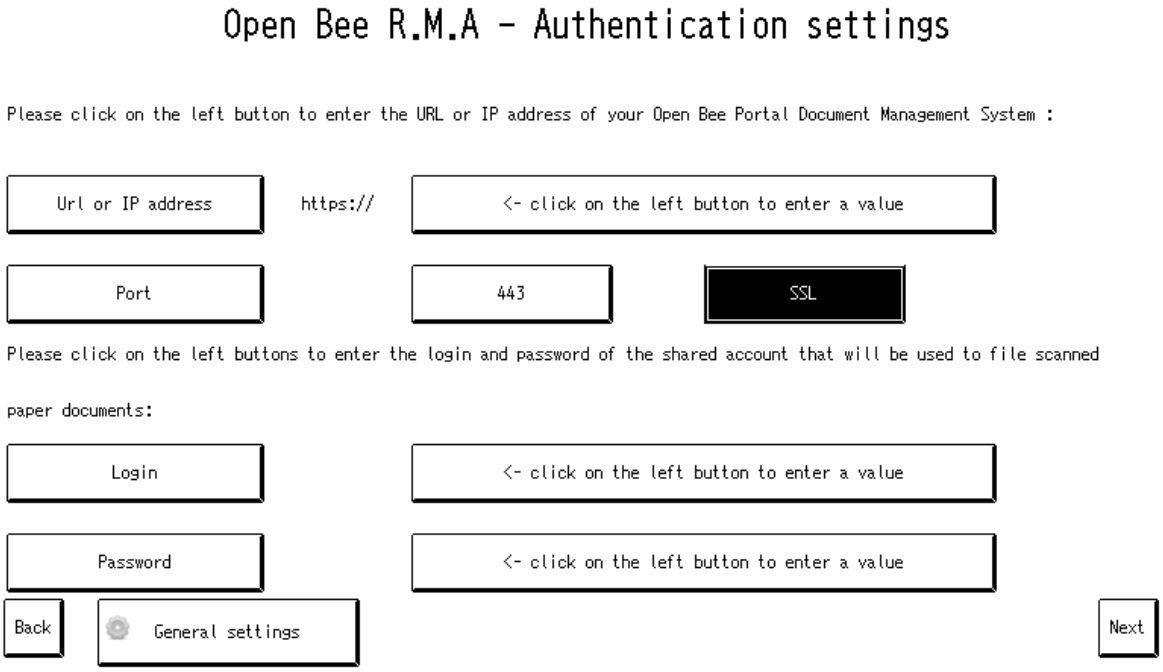
The first step  is related to the authentication mode. You can choose between two modes:

1. **Allow access without authentication**: this mode allows you to use one single account for all your users, and one will not have to log in each time one use the application.
2. **Require user authentication**: One need to enter login and password every time one pause (or stop) the application and restart it, you can also change the URL.

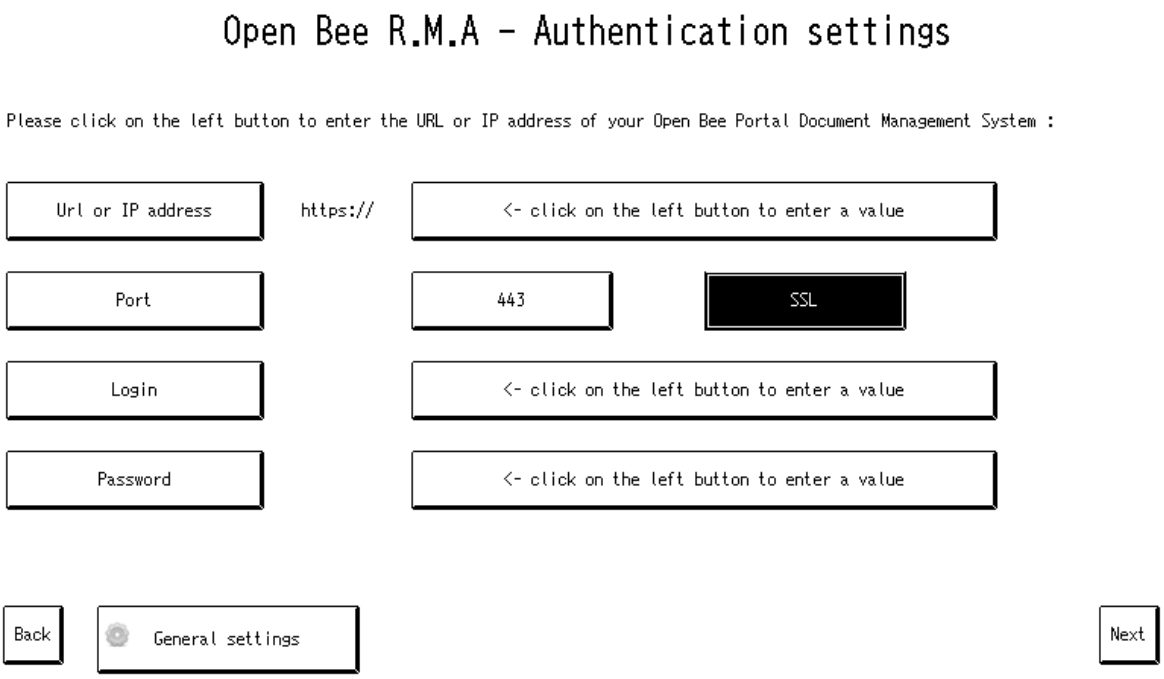
At any time, you can change those settings (please refer to next section).


Open Bee R.M.A - Authentication settings
Please select here whether you want to protect Open Bee R.M.A from usage by unauthorized staff or visitors, or not :
Allow access without authentication
Require user authentication

If you have selected “Allow access without authentication”, the following screen will be displayed


Open Bee R.M.A - Authentication settings
Please click on the left button to enter the URL or IP address of your Open Bee Portal Document Management System :
Url or IP address
https://
<- click on the left button to enter a value
Port
443
SSL
Please click on the left buttons to enter the login and password of the shared account that will be used to file scanned
paper documents:
Login
<- click on the left button to enter a value
Password
<- click on the left button to enter a value
Back
General settings
Next

If you have selected “Require user authentication”, the following screen will be displayed:

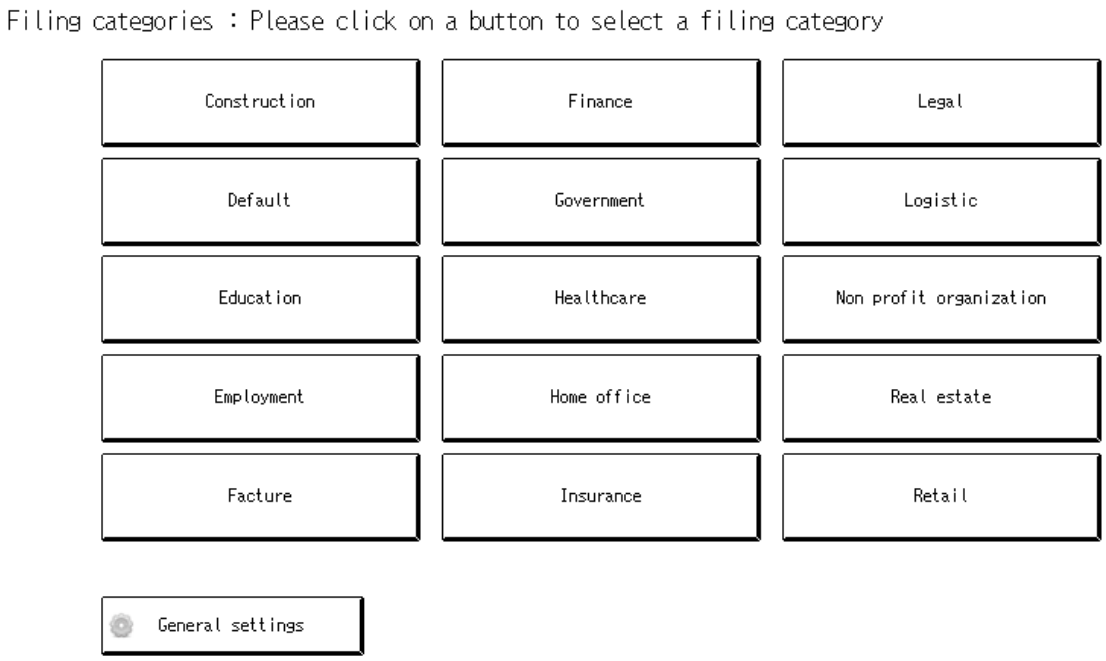

Open Bee R.M.A - Authentication settings
Please click on the left button to enter the URL or IP address of your Open Bee Portal Document Management System :
Url or IP address
https://
<- click on the left button to enter a value
Port
443
SSL
Login
<- click on the left button to enter a value
Password
<- click on the left button to enter a value
Back
General settings
Next

Click on each button tocomplete the fields using the screen keyboard.

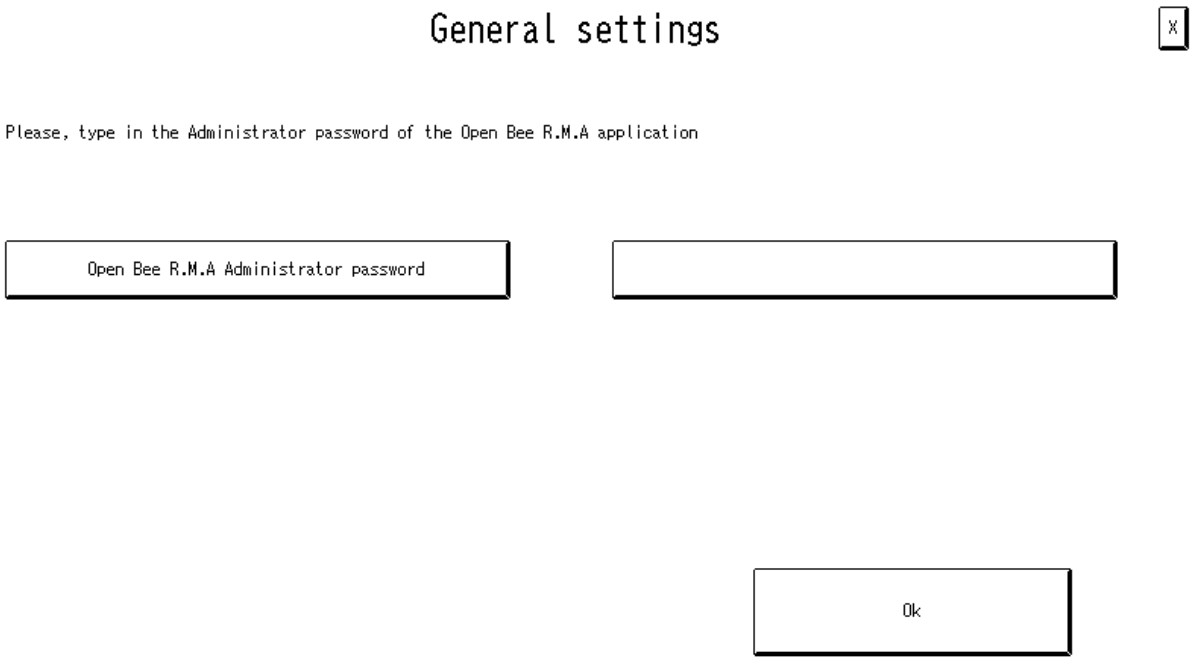
- *URL or IP address:* The host on which the Open Bee Portal run
- *Port*: This field allows you to enter the port number, do not select SSL if you do not use https.
- *Login:* A valid Open Bee Portal login (by default ‘admin’)
- *Password:* A valid Open Bee Portal password (by default ‘admin’)

# General settings:

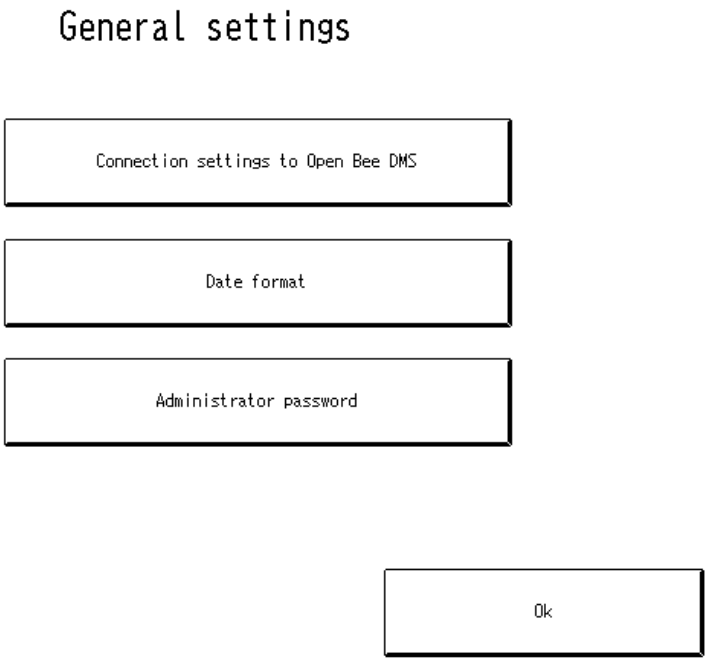
At the bottom left of the home screen of your application, click on the “General settings” button if you want to customise your settings:




You must enter the administrator password of the application, By default the password is: 123456


General settings
X
Please, type in the Administrator password of the Open Bee R.M.A application
Open Bee R.M.A Administrator password
Ok

Once logged in as an administrator, the following screen appears:

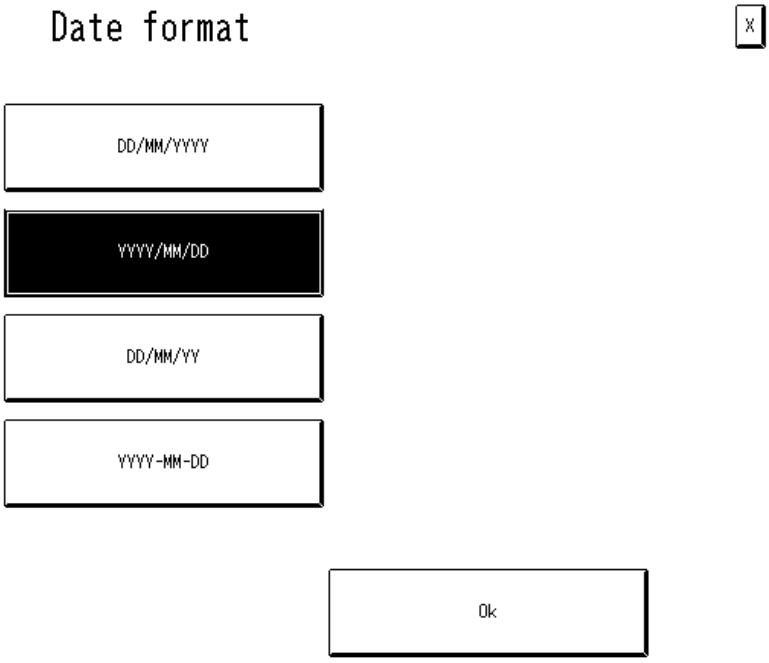



## Connection settings to Open Bee DMS:

This menu allows you to display the configuration wizard of Open Bee RMA described in the previous section

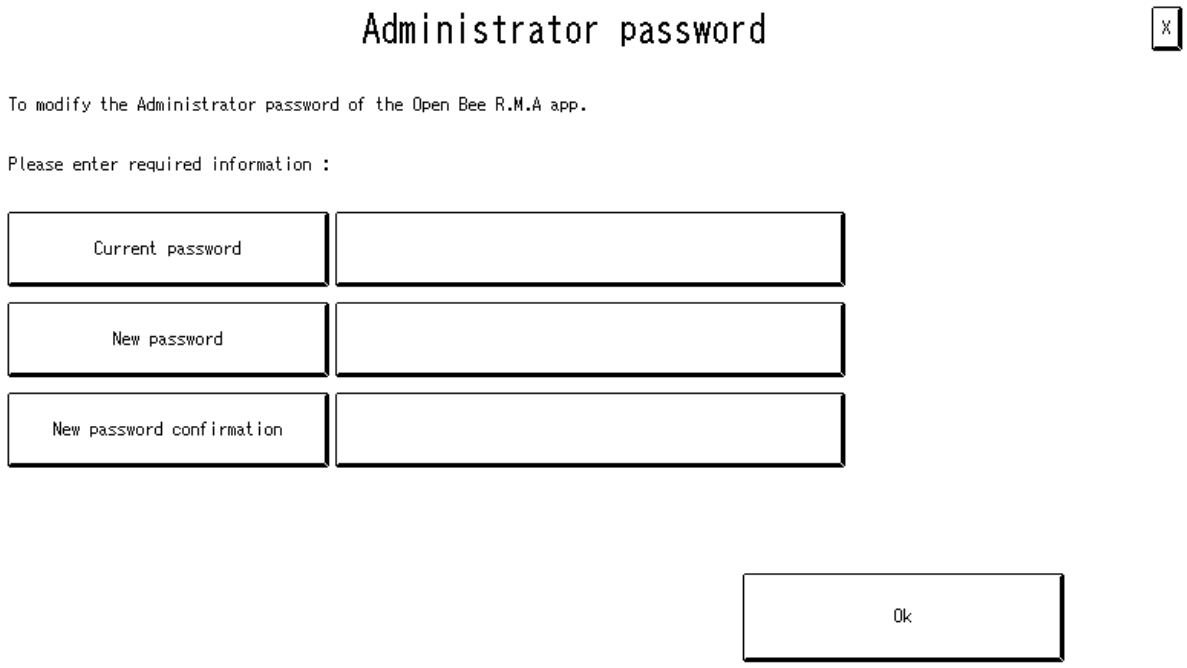
## Date format:

This menu allows you to choose your the date format. To save your settings, please click the OK button.



## Administrator password:

You can change the administrator password using this menu.

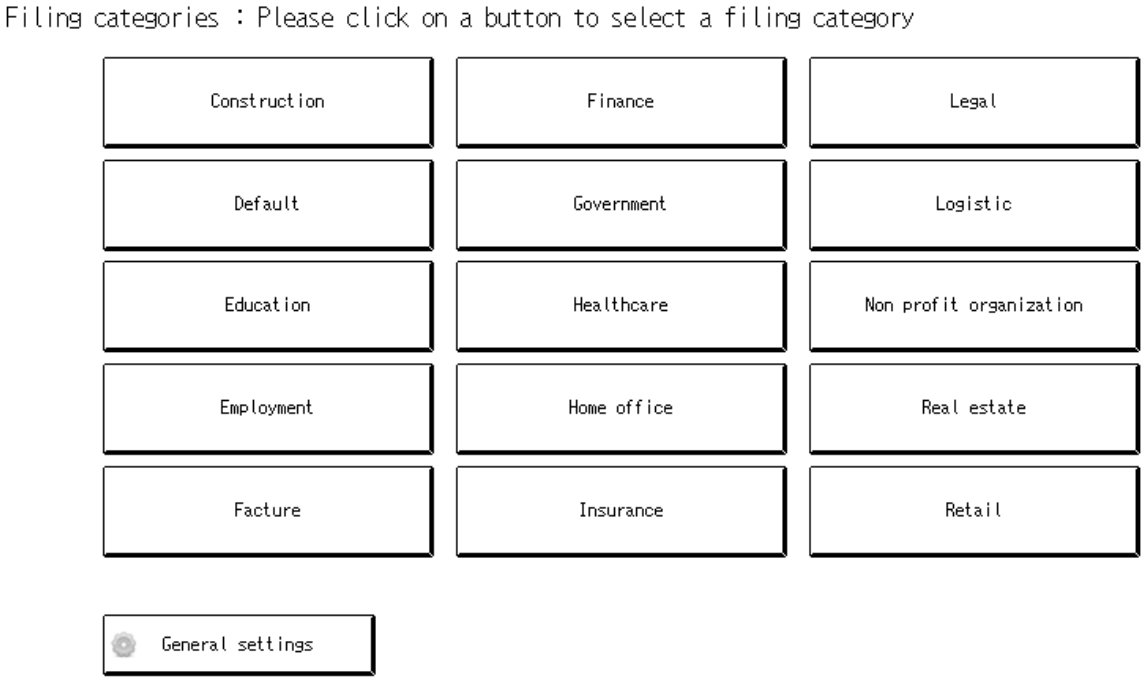


# Filing documents with Open Bee RMA

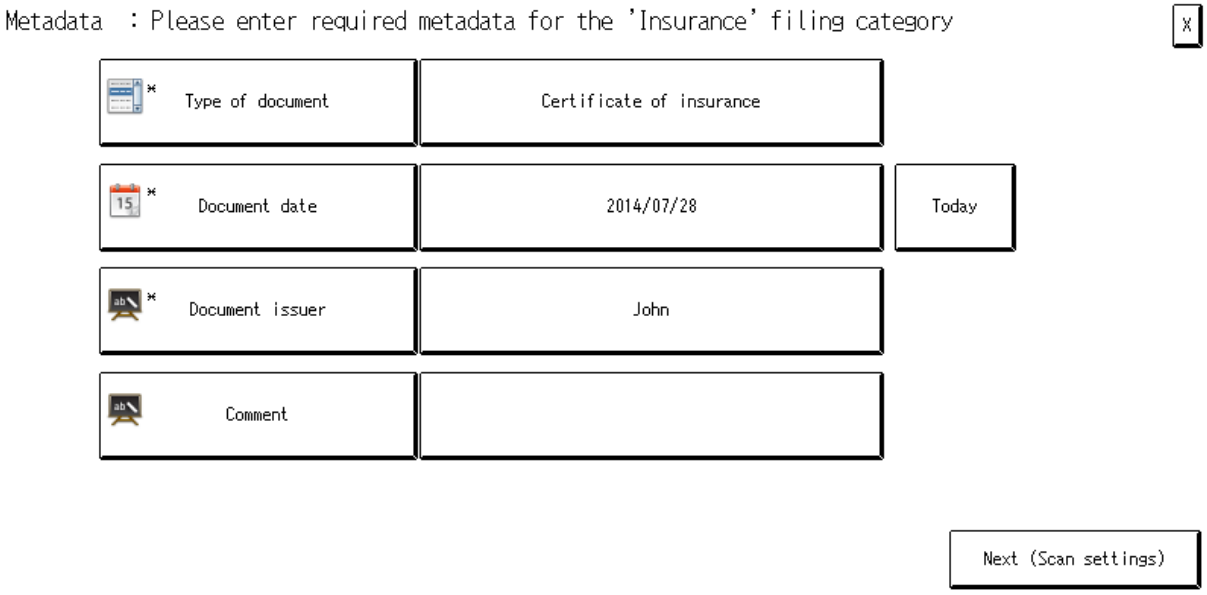
Load your original documents into the MFP.

Press the “Open Bee R.MA” button on the control panel.

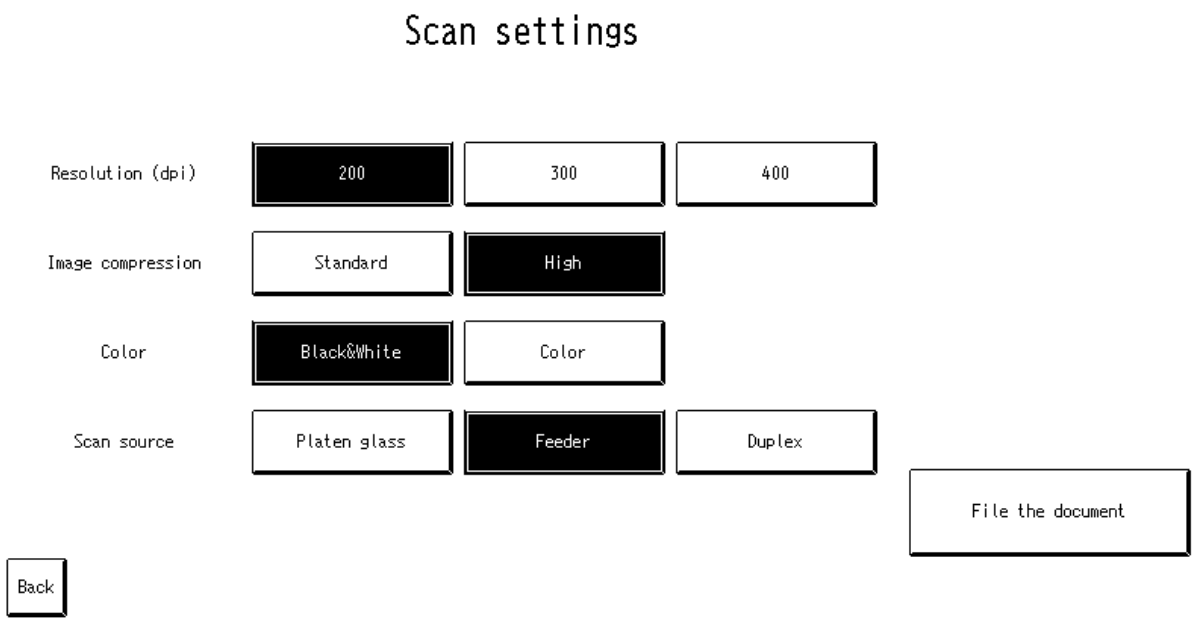
Select the filing category of your choice



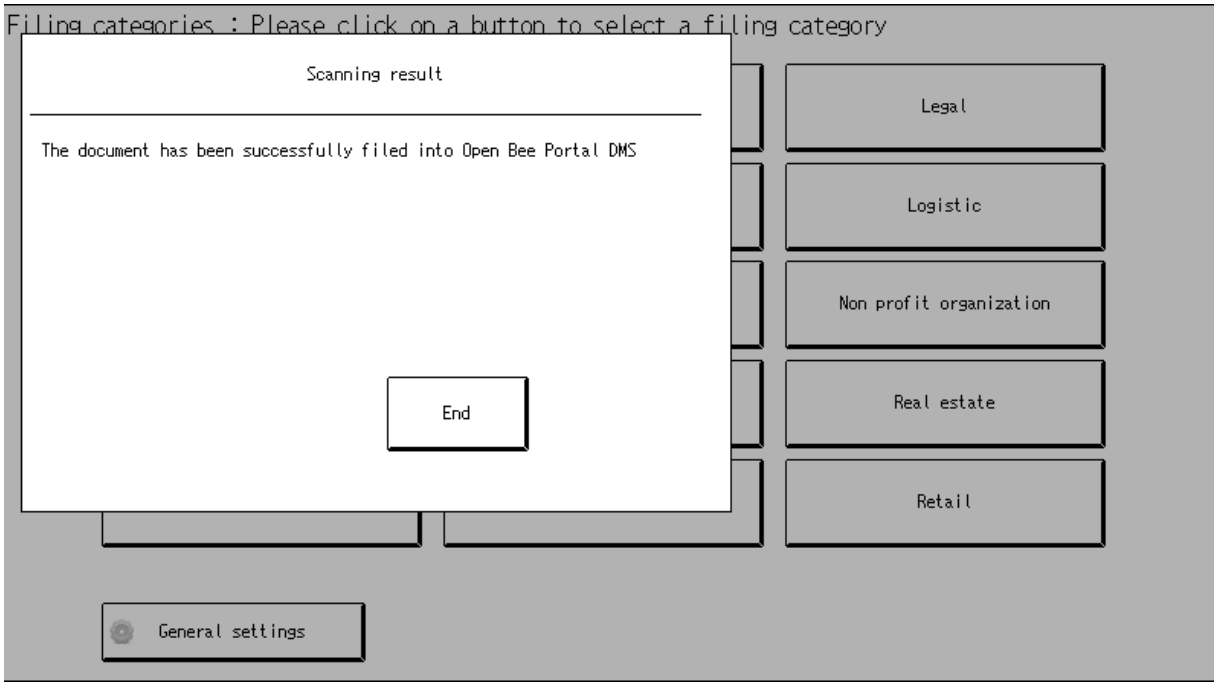
Input required metadata (every required metadata have a star *)



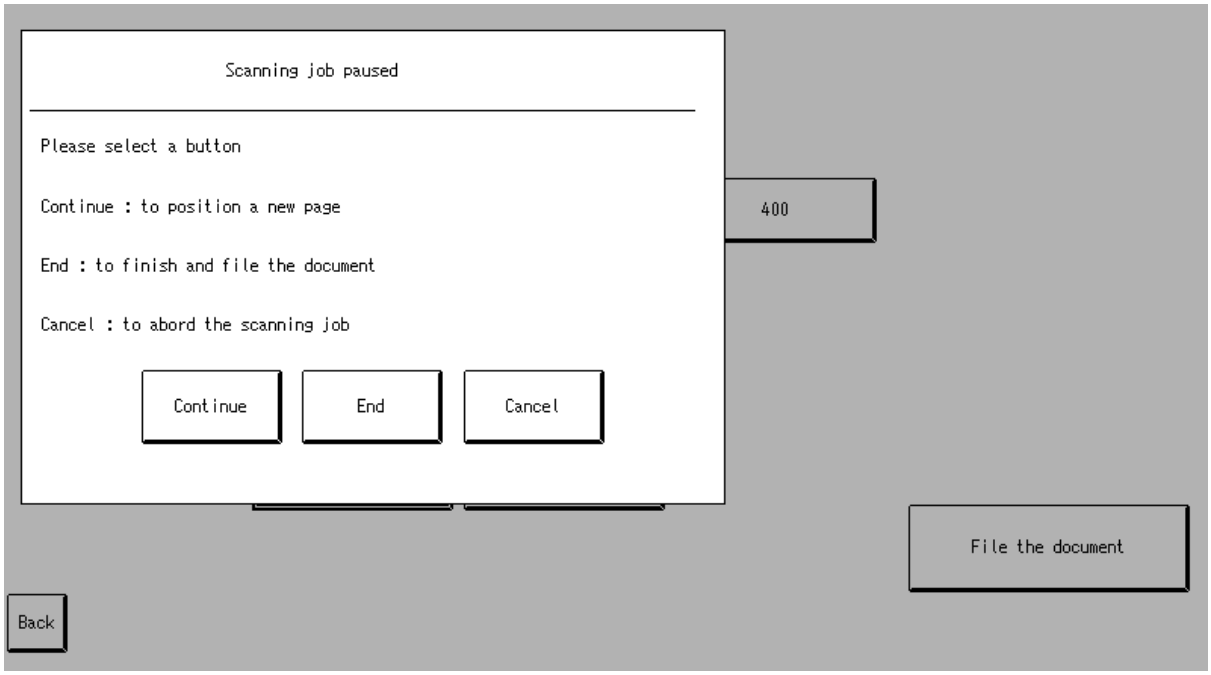

Select document resolution, color and scan source (the duplex mode is only available from feeder).



Press the 'File the document' button on the control panel to start filing the document to Open Bee Portal DMS




Scanning from platen is done page per page, once the first page is scanned, you must click the "continue" button to scan another page, or the "End" button to finish the scan job.




**Note:** Generally, place originals in the landscape orientation. If you place an original in the portrait orientation, the image is sent rotated by 90 degrees.

In duplex mode, each odd page will be upside down.

In order to auto rotate the images, make sure that Open Bee™ Scan O.C.R. Conversion Service (OCS) is enabled on your Open Bee DMS.

# Retrieving documents filed with Open Bee RMA

**Open Bee™ Portal offers a quick and simple access to all your documents that have been previously filed from your Ricoh MFP touch's screen thanks to Open Bee RMA.**

In order to retrieve your documents, please follow the next steps:

## Log in to Open Bee Portal as a registered user

In order to connect to the Open Bee™ Portal server, please run your web browser and the address that your network administrator gave you:

For instance: http://ricohdms.myopenbee.com

The following window pops up, asking you for your username and password:

Please login with the username and password provided by your administrator and click LOGIN.

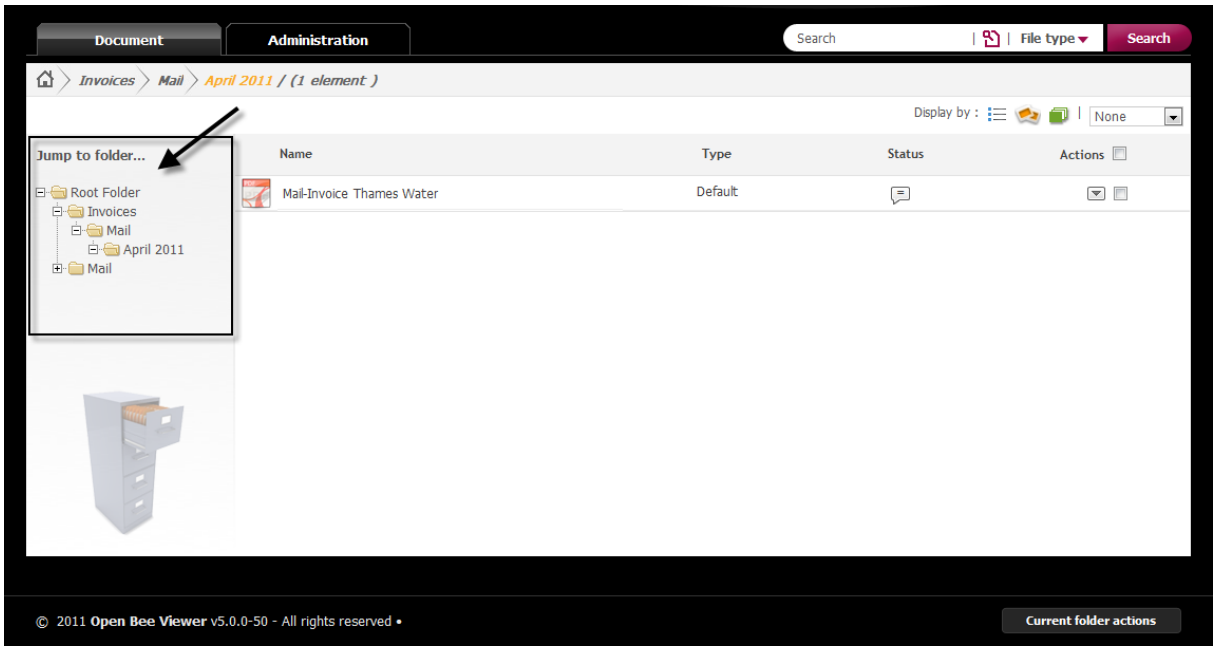
You are now logged in to Open Bee™ Portal. The displayed folders are those you have access to, whether it is as a reader only, or with advanced permissions.

**Note**: The username and password are case sensitive. Please make sure that the Caps Lock key is not enabled before typing your information.

In case of prolonged inactivity when logged in, the message « session has expired » will be displayed; you will then have to type your login and password from the login screen.

## Locate your documents

Exactly as in MS Windows, you can click the “Document” tab and click on folders to locate your documents.

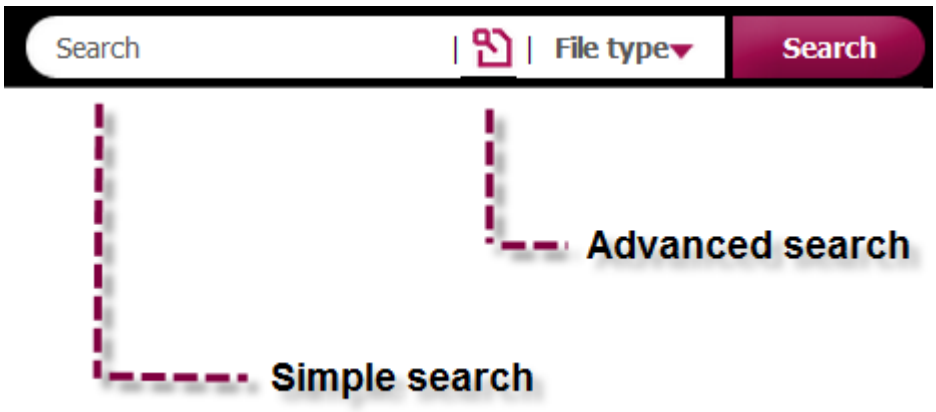



Note: Folders and sub-folders are automatically generated based on metadata inputted at MFP level thanks to the Open Bee RMA app. So it is very simple to locate your documents browsing the folder hierarchy.

## Searching your documents

This functionality allows you to search your documents.

From any page, you have access to the two different search modules: The simple search and the advanced search.

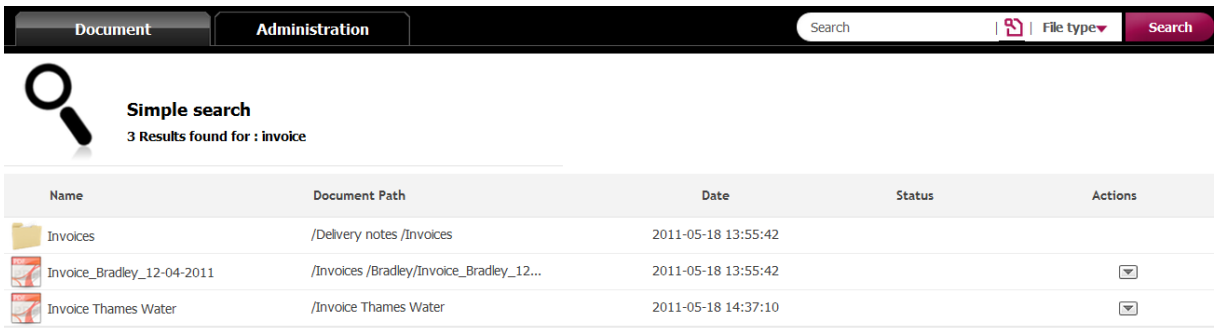



In order to retrieve a document previously filed thanks to Open Bee RMA, enter one or several keywords / series of characters within the frame and click « search » to run the search.

In this case, you can retrieve documents depending on the words contained within:

- Document title
- Metadata associated to the documents that have been prompted thanks to Open Bee RMA

Once the search has been run, a page is popping up, displaying all the documents matching your search criteria.




*There are also many multiple ways to retrieve a document. Please read the appropriate section of the Open Bee Portal user manual for more information on this subject.*

# Device compatibility list

Device list SDK Type-J version 11

MP C6502SP / MP C8002SP

Pro C5100S / Pro C5110S

MP C4503 Series / MP C5503 Series / MP C6003 Series

MP C3003 Series / MP C3503 Series

MP C2003 SP / MP C2503 SP

MP C2003Z SP / MP C2503Z SP

MP C4503Z Series / MP C5503Z Series / MP C6003Z Series

MP C3003Z Series / MP C3503Z Series

MP 2553 Series / MP 3053 Series / MP 3353 Series

MP 2553Z SP / MP 3053Z SP / MP 3353Z SP

SP 4510SF

MP 401 SPF

Device list SDK Type-J version 10

Aficio MP C3002 Series / Aficio MP C3502 Series

Aficio MP C4502 Series / Aficio MP C5502 Series

Aficio MP 4002 / Aficio MP 5002

Aficio MP 4002 SP / Aficio MP 5002 SP

Aficio MP 6002 Series / Aficio MP 7502 Series

Aficio MP 9002 Series

Aficio MP C305 Series

Aficio MP 301 Series

MP 2001 SP/ MP 2501 SP